



# FOUNDATION FOCUS

A PUBLICATION OF WILLAMETTE VIEW FOUNDATION

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## Are you feeling overwhelmed by all the tasks related to your finances?



**Want to feel that burden lifted?**

**Willamette View Foundation can help.**

You may already know that we pay the way for residents who are no longer able to meet their living costs at Willamette View. However, there is more to our service to residents than providing subsidy.

We are a constant source of comfort and relief from the burden of following up on income and benefits, paying bills, balancing checkbook, straightening out billings and balances, matching up medical bills and insurance explanations of benefits, and monitoring credit card

statements, just to name a few. We also consolidate and summarize all the information needed by the tax preparer in order to complete both Federal and Oregon individual tax returns for residents.

Our services are provided using a Durable Power of Attorney prepared by your attorney. We provide you with a detailed report each quarter so you'll stay informed about your financial activities.

These services can be provided to residents receiving direct subsidy as well as those participating in our financial tasks management services program. Both groups of residents receive assistance that is designed to provide peace of mind and financial security; it's golden!



Contact us if you would like more information about our assistance with financial tasks.

**It's one of the ways Willamette View Foundation helps residents.**

## LETTER FROM DIANE

I am thankful to be working for Willamette View Foundation. Each year at this time, I think about all the amazing residents I've met, our donors, and our assistance recipients. It is rewarding to be a part of something good.

We exist because residents and their families have believed in our mission to support residents when there is a financial shortfall or a need for financial guidance. We are grateful for all of our donors, and we are honoring their intentions.

Our purpose is to be here when residents need financial help, and our resources are available for that purpose. We hope that brings some peace and comfort to you.

How ever you choose to celebrate in the weeks ahead, may this season bring you peace, hope, and comfort. If you need us, we are here.

Happy Holidays to all of you.

Warmly,  
*Diane*



## Thank You For Your Continued Support

As Thanksgiving approaches we offer sincere appreciation to all of our donors and express deep gratitude on behalf of the many residents who have received assistance in the past, those currently receiving assistance, and those who will receive assistance from the *Willamette View Foundation* in the future.

## 2023 RESIDENT INFLATION OFFSET GRANT PROGRAM

Willamette View Foundation is helping Willamette View residents that have been impacted by the economic challenges and rising costs.

The 2023 Resident Inflation Offset Grant Program is giving grants to each resident who is on a fixed income with \$400,000 or less in net worth excluding personal property (\$800,000 for couples).

This program is for Willamette View residents and will run through the end of this year.

We are offering a one-time grant of \$5,000 to Independent and Assisted Living residents and \$10,000 to Health Center residents. Obtaining this grant is simple and quick.

If you would like to receive a grant, please let us know. We will send you a grant request form to submit. All we need is your name, address, phone number, signature, and date. No other information is required.



# *Financial Assistance through Willamette View Foundation*

Are you interested in receiving Financial Assistance from the Willamette View Foundation? We have resources that have already been accumulated to help you.

## **What can the Foundation do for you?**

The Foundation can help when ends don't meet. We have resources available to assist with your Willamette View bill when you have out lived your resources.

## **How do you ask for help?**

Just give us a call and we'll walk you through our very simple application process. Your request for assistance will be reviewed by the Willamette View Foundation's Board of Directors, with anonymity, on a case-by-case basis after an evaluation of your specific circumstances.

## **What are some standards to keep in mind and what is expected of the residents?**

- Residents are expected to preserve and manage their assets wisely, including maintaining appropriate insurance.
- Residents must have used their resources for reasonable recreation and personal expenses, including reasonable charitable contributions and gifts to friends and family.
- Residents should obtain necessary medial care through economical means based on individual circumstances.
- Residents should strive to live within their financial means and refrain from extravagant spending.



**Contact Willamette View Foundation at 971.233.8956 if you are interested in more details about our assistance program.**



## Willamette View Foundation

11226 SE 21st Ave

Portland, OR 97222

ADDRESS SERVICE REQUESTED

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## WILLAMETTE VIEW FOUNDATION

**971-233-8956**

**Diane Wernli**, Executive Director  
diane@willametteviewfoundation.org

**Christy Noble**, Business Operations Mgr.  
christy@willametteviewfoundation.org

### FOUNDATION BOARD OF DIRECTORS

Mike Gallagher - President

Greg Dufault- Vice President

Ron Gustafson- Secretary/Treasurer

Dennis Braun

Carol Cameron

Elise Meyers

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**THE FOUNDATION'S MISSION** is to help qualified residents of the Willamette View Retirement Community maintain their dignity and independence through assistance in satisfying their need for housing and financial security. Aid is provided through resident assistance and financial management programs, educational seminars, financial information service, publications and grants to Willamette View, Inc. that benefit the community's residents.

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### **Lift Spirits During the Holidays**

**Here are some tips for enjoying the holiday season**

- ♦ ***Pay someone a compliment***
- ♦ ***Send a loved one a letter***
- ♦ ***Smile at everyone you see***
- ♦ ***Give someone a hug***
- ♦ ***Volunteer your time***
- ♦ ***Practice random acts of kindness***

